

# Ops Role Playbook

OPERATIONS TEAM READINESS

DELIVERABLE Role overview + onboarding checklist

## PURPOSE

Brief every operations role on routines, rituals, escalation zones, and accountability during live incidents.

## ROLE OVERVIEW

ROLE	PRIMARY FOCUS	ESCALATION ZONE	DAILY RITUAL
Incident Commander	Coordinate fixes, bridge cadence	Bridge & exec	0800 readiness check
Troubleshooter (Tier 3)	Technical recovery	Engineering lead	10m hot-warm sync
Customer Liaison	Stakeholder messaging	Comms / Customer success	09:30 status digest
Capacity Manager	Guard throughput	Platform risk	Monitor THR threshold

## RITUAL CHECKLIST

- Review open incidents with owners assigned.
- Validate incident tiering (P0-P3) and trigger severity table.
- Confirm secondary support coverage for night/weekend.
- Update timeline snapshot in shared doc.
- Capture lessons-to-date for the PIR.

## ESCALATION MAP

- Tech lead → Incident Commander (if unresolved after 30 minutes).
- Incident Commander → Incident Board (exec & legal) when impact > \$[THRESHOLD AMOUNT — define per contract tier] or regulatory. *Note: This threshold should be defined during onboarding based on your contract tier. Default for standard contracts is \$10,000/minute of impact; adjust per agreement.*
- Customer Liaison → Customer Exec when SLA is breached or high-profile.
- Capacity Manager → Platform Risk for cascading outages.

## COMMAND POST ROTATIONS

### TRIGGER CONDITIONS — STANDING UP A COMMAND POST

A command post must be activated when ANY of the following conditions are met:

- P1 or P2 incident is declared.
- Impact threshold is breached (see Escalation Map, line 2).
- Customer-facing SLA breach is imminent or active.
- Cascading outage detected or suspected.
- Executive or legal escalation is required.

### ACTIVATION SEQUENCE

1. **Incident Commander declares activation** — Broadcast on incident channel: "Command Post ACTIVE. [Brief description]. All roles check in."
2. **Notify primary bridge operator** — Tag @bridge in incident channel; confirm bridge line is live.
3. **Broadcast initial situation report** — Post to incident channel within 5 minutes:
  - Current impact scope (services, customers, regions affected)
  - Current timeline start
  - Current incident tier
  - Immediate actions underway
4. **Confirm secondary coverage** — Verify Deputy is alerted and ready; confirm Data Steward and Archivist are monitoring.
5. **Open incident log** — Create or confirm shared log entry; link in incident channel topic.
6. **Initial stakeholder notification** — Customer Liaison notifies Customer Exec if SLA impact triggered.

### SHIFT HANDOVER PROTOCOL

- Handover windows: 0800–0830, 1600–1630, 0000–0030 (24/7 coverage).
- Outgoing IC provides verbal handoff on bridge: current status, open actions, pending decisions, watch points.
- Incoming IC acknowledges readiness and repeats critical items back.
- Handoff is complete only when incoming IC confirms "Command Post ready — assuming IC."
- Archivist posts handoff summary to incident log with timestamp.

### DEPUTY HAND-OFF PROCEDURE

- Deputy monitors all incident channel traffic while in standby.
- Deputy is auto-escalated to IC if IC does not acknowledge a new P1/P2 within 10 minutes.
- On handoff: Deputy receives full context from IC before assuming command.
- If Deputy takes over mid-incident, prior IC remains available via dedicated backup line for 30 minutes post-handoff.
- Deputy tracks their on-call window in the rotation calendar; swaps require 48-hour advance notice.

### ROSTER ROLES

- Primary: Incident Commander (24/7 coverage window).
- Secondary: Deputy (ready to take over after alert).
- Data Steward: Ensures dashboards & logs remain accurate.
- Archivist: Posts updates to the incident log and PIR board.

## ONBOARDING CHECKLIST

ITEM	OWNER	STATUS
Access to incident channel & runbooks		
Familiarity with tooling (monitoring, alerts, conference bridges)		
Bridge script memorized (cadence, stakeholders)		
Contacts for legal, exec, product, security		
SLA/keystone metrics briefing		
Incident severity calibration (P0–P3 definitions access)		
Communication channels map (incident channel, escalation contacts, bridge lines)		
Role-specific runbook and playbook access		
PIR ownership and handoff process		
Shadow rotation on live incident (mandatory first shadow)		